User Reference Guide:

Organization Management

oneresponder.net

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Contents

Glossary

Acronyms

- POC = Point of Contact
- PTB = Position Task Book
- IMT = Incident Management Team
- EMI = Emergency Management Institute
- TEEX = Texas A&M Engineering Extension Service
- NWCG = National Wildfire Coordinating Group

Term Definitions

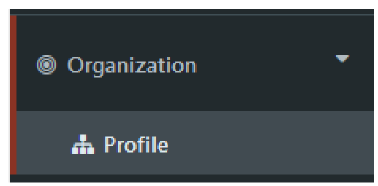
- QualSheet = This is a description of all requirements that define a given position.

Introduction

Organization Managers are able to configure several elements in the administrative portal of OneResponder to best reflect their offline organization's structure, personnel, and qualifications management information. This user guide will walk through all actions that can be performed to allow such configuration.

View Your Organization Profile

1. Log in to the Organization Manager.
2. In the dark gray menu on the left-hand side of the page, locate the "Organization" option and select it to expand the option and view specific pages. From those sub-options, select "Profile."



This will navigate you to your organization's Organization Profile, from which all following actions are performed.

Establish Organization Contact Points

Select a Home Location

1. Locate the “General Information” grid. This grid contains basic information about your organization’s identity, including a Home Location, if one has been added.
2. To update the Home Location, locate and select Manage. This will navigate you to the Edit Organization page, upon which you can perform several actions.
3. Locate the “Home Location” dropdown. If a Home Location has previously been assigned, that location will be displayed in the dropdown.
4. Select the dropdown to display a list of all locations associated with your organization in the system.
    a. This dropdown identifies all those facilities that have been added for your organization.
        i. For more information about creating a facility, please review the Manage Facilities section in this User Guide.
5. Select the appropriate location.
6. Select Save in the top right corner of the page to confirm your changes.

Select a Primary Point of Contact (POC)

1. Locate the "General Information" grid. This grid contains basic information about your organization's identity, including a Primary POC, if one has been selected.
2. To update the Primary POC, locate and select Manage. This will navigate you to the Edit Organization page, upon which you can perform several actions.
3. Locate the "Primary POC" dropdown. If a Primary POC has previously been assigned, that individual's name will be displayed in the dropdown.
4. Select the dropdown to display a list of your personnel.
    a. This list will only display your organization's Direct Personnel.
        i. Personnel who are Auxiliary members of your organization are unable to be designated as the Primary POC for your organization.
        ii. Personnel belonging to a subordinate of your organization are unable to be designated as the Primary POC for your organization.
5. Select the appropriate individual.
6. Select Save in the top right corner of the page to confirm your changes.
    a. Once you have selected a new Primary POC, that individual's name will be displayed on the Organization Profile page, as well as their Primary Email and their Primary Phone Number.
        i. The email address and phone number must be validated in order to be displayed on the Organization Profile page.

Establish Network Relationships

1. Locate the "Network Relationships" menu bar and select ^ to expand the table and view the available types of relationships which can be established in OneResponder. All actions within this section are performed within this expanded table.

Create Subordinate Organizations

1. Locate the "Subordinate Organizations" menu bar and select ^ to expand it and view a list of direct subordinate organizations.
   a. If any of your subordinate organizations have created subordinates of their own, you are able to view all levels of subordinate organizations by expanding the "Subordinate Organizations (All)" table.
   b. All Counties have been prepopulated in the system, so if you are an Organization Manager for a State-level organization, you will not need to create subordinate organizations for your counties.
2. Locate and select **Manage** on the far-right side of the menu bar. This will navigate you to a Manage Subordinates page.
   a. On this page, you're able to update the organization features of existing subordinate organizations by selecting **Administer** to the left of the appropriate organization name.
3. Select **+ Create**, found in the top right of the page. This will open a modal with several fields of information.
   a. Add the name of the subordinate organization in the Name text input field.
      i. All organization names must be unique; you cannot have two subordinate organizations with the same name.
   b. Select the type of organization you are creating from the Type dropdown.
      i. Depending on the type you select, you may then also be required to select a County for that organization.

c. Select the core function of the organization from the Function dropdown.
d. Identify those features you would like to keep enabled for this subordinate organization.
    i. By default, any subordinate organization you create will have enabled all those features which are enabled for your organization.
        1. You may deselect any features which have been default enabled; however, you will be unable to enable features for the subordinate organization you are creating that are not enabled for your organization.
        2. Any features that are not enabled for an organization can be performed by the administrators of the respective parent organization.
    ii. Custom QualSheets allows organization administrators to configure positions to add their own requirements.
    iii. Issue PTBs allows organization administrators to issue PTBs to personnel within their organization.
    iv. Approve PTBs allows organization administrators to approve PTBs that have been completed and submitted by personnel within their organization.
    v. Manage Training Courses allows organization administrators to create training courses for their organization.
    vi. Define Local Positions allows organization administrators to create Local Positions for their organization.
    vii. Invite Personnel allows organization administrators to invite personnel into their organization.

viii. Manage Subordinates allows organization administrators to create and manage their organization's subordinates.

e. Select ✔ Create at the bottom right of the modal.

f. Once you have created an organization, as an administrator of its parent organization, you are then able to select to view the subordinate's Organization Profile and can manage features on its behalf.

Initiate an Organization Partnership

1. Locate the "Partner Organizations" menu bar and select to expand the grid and view all partnerships that your organization has established.
    a. This grid will display Partnerships of multiple Statuses.
        i. Partnership Status: Request Pending indicates that you have initiated a partnership request that has not yet received approval from administrators of the requested organization.
        ii. Partnership Status: Active indicates that the partnership request was received and approved by administrators of the requested organization.
        iii. Partnership Status: Defunct MM/DD/YYYY indicates that a previously Active partnership has been severed by administrators of one of the organizations.
        iv. If you have requested a partnership, but administrators of that organization denied the

request, you will receive email notification of the workflow update but will not see the rejected partnership among your list of partner organizations.

2. Select Invite in the top right corner. This will open a modal containing a list of all organizations in the system.
   a. You can narrow the results by expanding the filters, or by utilizing the quick-search tool.
3. Locate the appropriate organization and select Select to the left of its name.
4. Select Submit in the bottom right of the modal.
5. You will be prompted with an optional comment modal wherein you can add a comment to contextualize your partnership request.
   a. Enter a comment.
   b. Select Save to confirm your choice and finalize the partnership request. This will initiate a workflow that will be sent to administrators of the requested organization for their review.

While a Partnership is in a pending state, you will be able to view a limited amount of information belonging to the requested organization. Once a Partnership is approved, administrators in both organizations will be able to determine what additional information they wish to share with the other. For more information about determining information sharing, please review the [Manage Relationship Data Sharing] section in this user guide.

Cancel a Pending Partnership Request

If you need to cancel a pending partnership request, you can do so on the Manage Partner Organizations page.

1. Locate the appropriate pending request.
2. Select ✖ Cancel Request to the left of the organization name.
3. You will be prompted with a warning modal asking you to confirm your choice.
    a. If you select ✖ Cancel Request, it will confirm your cancellation.
        i. Both you and administrators of the selected organization will be notified via email of the cancelled request.
    b. If you select ✖ No, no action will be taken, and the request will remain in a pending state.

End an Active Partnership

Once an organization partnership has been established, administrators of either organization are able to sever the partnership at any time. This action can be performed on the Manage Partner Organizations page.

1. Locate the appropriate active partnership.
2. Select ✖ End Partnership to the left of the organization name.
3. You will be prompted with a warning modal asking you to confirm your choice.
    a. If you select ✖ End Partnership, it will confirm the partnership severance.
        i. Both you and administrators of the selected organization will be notified via email of the severed partnership.
    b. If you select ✖ No, no action will be taken, and the partnership will remain active.
4. Once the partnership severance has been confirmed, the name of that organization will remain listed among your

organization's partners, with a Partnership Status of Defunct: MM/DD/YYYY, wherein the date-stamp reflects the day upon which the partnership was ended.

a. If you ever need to re-establish a partnership with an organization, the process by which to invite them remains the same as demonstrated in the first element of the Partnership section.
    i. Re-establishing a partnership will not remove the record of your organization's previous partnership with them but will instead create a new record to reflect the new partnership.

Memberships

This menu bar holds no data and cannot be edited. Its functionality is still in development and will be implemented in an upcoming development cycle.

Manage Relationship Data Sharing

1. Locate “Organizations with Access to ORGANIZATION” and select ^ to expand it and view all organizations with which you have an active relationship, as well as permissions defining what administrators in those organizations are able to see.
   a. This list will not include any subordinate organizations you may have, as administrators of subordinate organizations are unable to access your full organization profile.
2. To update those permissions, select Manage on the far-right of the menu bar. This will navigate you to the Manage Data Sharing page.
3. The table on the page will list all organizations to which you hold an active relationship, as well as checkboxes to enable permissions for certain functionalities.
   a. Note: Organizations are unable to disable the permissions for the OneResponder organization. During the Beta Evaluation period, users will be unable to edit the OneResponder permissions, thus ensuring that users will be able to receive adequate troubleshooting and training upon request.
4. Different organization relationships allow for different permissions.
   a. An “Ancestor” type organization indicates that it is a parent organization of yours, or a parent of your parent.
      i. By default, Shared Management is selectable, and the other options are visible to them.
      ii. If you need to disable shared management with your parent organization, deselect ✓ to remove shared management.
         1. Once you have removed Shared Management, you will be able to determine what elements of your organization you would like to remain visible to your parent organization. Deselect whichever features you would

like to disable for the selected parent organization.

2. Note: If you disable Shared Management with a parent organization, you will only be able to perform those organization-level features that were enabled prior to then. If you need additional organization features enabled, you must first re-enable Shared Management in order for your parent organization to update those features.

b. A "Partner" type organization indicates that it is an active partner organization of yours.

   i. Shared Management is not available for Partner organizations.

   ii. You can determine what information you would like to have visible for your partners by selecting .

   iii. Each organization in the partnership determines its own elements of visibility. For instance, if your partner shares all selectable elements with you, that does not mandate you to reciprocate evenly. You can select the level of transparency independently of what your partner organizations select to share with you.

   iv. Once a partnership is severed, neither you nor the administrators of your previous partners will maintain access to each other's organization.

c. You will not see "Subordinate" type organizations in this grid. As their parent, unless they have disabled Shared Management, you will be able to view and manage all features that you have enabled for that organization.

Invite Personnel

Direct Personnel

1. Locate “Direct Personnel” and select ^ to expand the grid and view all direct personnel within your organization
    a. This will display personnel of all Status types.
2. Select **Manage** on the far-right of the menu bar to be navigated to a page allowing you to manage your personnel.
    a. The **Administer** button in the left-most column of the page allows you to view and manage basic information about your personnel, including their username and password, and the ability to deactivate their account and lock or unlock their account as appropriate.
        i. This information is also accessible on the corresponding individual’s Personnel Details page.
    b. In the top right corner of the page are two buttons: **Invite** and **Bulk Invite**. Both methods can be used to invite personnel into your organization.

Single Invite Personnel

1. Locate and select 

.

   This will open a modal with several fields of input.

   a. The “First Name” and “Last Name” fields are required.
   b. The “Middle Initial” field is optional.
   c. The “Email” field is required.
   d. The “Is this their work email?” field will be selected by default; however, if you are inviting an individual using their personal email address, you can deselect this field.
   e. “Phone” is an optional field allowing you to add the individual’s phone number; and the “Is this their work phone?” field is selected by default but can be deselected if the phone number entered is not a work phone.
      i. We currently do not have any functionality implemented with phone numbers; however, we do plan to implement a notification functionality in the near future.
   f. An additional benefit of this invite modal is the ability to convey four of the administrative roles assignable in the system.
      i. If none of these admin roles are selected, the invited individual will only have access to their Responder Portal.
   g. You are also able to add a contextualizing comment into the ‘Optional Comment’ field. Any text entered here will be included in the email invitation to that individual.

2. Select 

to send the invitation.

Bulk Invite Personnel

1. Locate and select Bulk Invite.
   This will navigate you to a page titled 'Bulk Invite Personnel'.
2. Locate Download a sample import file with instructions and select that to download a formatted Excel template.
3. In the template, there are seven fields of information on the first sheet.
   a. First Name, Last Name, Email, and Work Email? (Y/N) are required fields.
   b. Middle Initial, Phone, and Work Phone? (Y/N) are optional fields.
   c. The second sheet of the file contains instructions to inform you which fields of information must be filled out for a successful import.
4. Add as many personnel to this sheet as appropriate.
   a. Each email address you enter must be unique within our system.
   b. Note: When inviting an individual, use only one email address per person. Once they have accepted their invitation, they are able to add secondary email addresses to their account, which will prevent duplicate accounts from being created.
5. Save the file to your computer and return to the Bulk Invite Personnel page.
6. Locate Select File. This will open a window allowing you to search your computer for the Bulk Invite file.
7. Once you select the file, the system will run a report of the email addresses included.
   a. All results will be displayed in a table labeled 'Import Results,' and each can be viewed in closer detail by selecting .
   b. If you upload an email address that does not contain the individual's last name, the system will return a warning requesting you to verify that the email address is correct.

i. If the email address is correct, you do not need to take any further action.

ii. If the email address is incorrect, you are able to select to open a field allowing you to correct the email address, or you can select

Exclude

to remove this entry but continue with the import.

c. If you upload an email address that already exists in the OneResponder network, the report will return an error and will not allow you to proceed with the report until the error is resolved.

i. You are able to select to open a field allowing you to correct the email address, or you can select

Exclude

to remove this entry but continue with the import.

d. You can export an Excel copy of the Import Report by selecting Get Report.

e. If necessary, you can cancel the import by selecting Cancel Import.

8. Once all warnings have been reviewed and errors are resolved, select Commit Import.

9. You will be prompted with a modal asking you to confirm your choice to continue with the import.

a. If you are importing a large file, the final import may take several minutes. Do not navigate away from the page.

10. Once the import has been successfully completed, you will be navigated back to the Bulk Import Personnel page.

a. When you have been returned to the Bulk Import Personnel page, all personnel included on the import will have been sent an email invitation.

i. All personnel invited using the Bulk Import will be invited without administrative access to the Organization Manager.

11. All Bulk Invite Imports will be archived in the 'Import History' grid. Users will be able to download a copy of both the Original File and the Import Report file from all previous imports.
    a. This will include all Imports, and their Status will reflect the success of their import.
        i. A Status of "Processed" indicates a successful import.
        ii. A Status of "Rejected" indicates a user was unable to successfully complete an import or chose to cancel an in-progress import.
        iii. If Continue is hosted in the Status column, it indicates an import still in progress.
            1. If an import is in progress, it must be either completed or cancelled in order to perform another import.

Auxiliary Personnel

1. Locate "Auxiliary Personnel" and select ^ to expand the grid and view all personnel who hold an auxiliary connection to your organization.
    a. Auxiliary Personnel are those individuals who have a connection to your organization, but it is not among your Direct Personnel.
    b. If you have a connection to another organization outside of your Primary Organization, such as being a member of your regional Incident Management Team (IMT) whilst holding your primary job. You can establish an auxiliary connection to your organization that does not remove your connection to your Primary Organization – for more information about Auxiliary Memberships, please review our User Guide: Auxiliary Relationship Management.
2. Select Manage to be navigated to the Manage Auxiliary Personnel page.

a. If you have a pending Auxiliary request, you can cancel it by selecting Cancel in the far-left column of the grid.

b. If you need to end an Auxiliary connection to an individual whose connection is Active, you can do so by selecting Release in the far-left column of the grid.

3. To invite an individual to be an Auxiliary member of your organization, locate and select Invite in the top right corner of the page.

4. This will open a modal listing all personnel in the system.

5. Locate the appropriate individual and click Select to the left of their name.

    a. You are able to select multiple people to invite at once, if necessary. In order to do so, click Select to the left of as many personnel as are appropriate.

6. Select Submit at the bottom of the modal.

7. This will close the modal and open a comment modal, allowing you to add a contextualizing comment to your invitation.

    a. Please Note: if you have selected multiple personnel to invite at once, all selected personnel will receive the same comment in their invite notification.

8. Enter any comment you would like and select Submit. This will close the comment modal and send your invitation(s).

9. Once your invitation has been sent successfully, you will see the name of the individual listed in the Auxiliary Personnel grid with a Membership Status of Pending.

    a. While an invitation is in a Pending Status, you will be able to view a limited Personnel Details page but will not be able to view their qualification details or contact information until after they accept their invitation.

    b. If the individual accepts their invitation, their Membership Status will update to display Status Active.

i. After an individual accepts their invitation, you will be able to view their full Personnel Details page.

c. If the individual rejects the invitation, their information will be removed from the Auxiliary Personnel grid.

i. If an individual rejects their invitation, you will be unable to view any information on their Personnel Details page.

Manage Pending Invitations

If you have any pending invitations, be it for Direct Personnel or for Auxiliary Personnel, there will be a "Pending Invites" grid. Select to expand the grid and view all Pending Invitations.

Resend Individual Invitations

1. All invitations have an expiration period. If an invitation has expired, you are able to resend it by selecting Resend in the far-left column of the grid.
   a. Please Note: OneResponder sends reminder email to all personnel with pending invitations on Monday morning until the Expiration Date passes.

Delete Individual Invitations

1. If you need to delete an invite, select Delete in the far-left column of the grid.

Bulk Manage Invitations

1. Locate Manage on the far-right of the Pending Invites menu bar. This Manage button differs from most of the others in OneResponder, in the sense that it is a dropdown.

2. If you need to resend all Pending Invitations, select

   Resend All .

   a. Please Note: Depending on the number of Pending Invites, this process may take several minutes.
   b. Once you resend invitations for Direct Personnel, it will reset the expiration window to 30 days after the date upon which you resent the invitation.

3. If you need to delete all Pending Invitations, select

   Delete All .

   a. You will be prompted with a warning modal to confirm your choice.
      i. If you select Delete, all invitations will be deleted.
         1. Please Note: Depending on the number of Pending Invitations, this process may take several minutes.
      ii. If you select Cancel, no action is taken, and all Pending Invites will remain Pending.

Manage Facilities

Create a New Facility

1. Locate "Facilities" and select ^ to expand the grid and view all facilities previously added to your organization.
2. Select Manage on the far-right of the menu bar to be navigated to a page allowing you to manage your facilities.
    a. The Edit button opens a modal allowing you to edit the location information of the selected facility.
        i. You are also able to designate a facility as your organization's Home Location.
    b. The ✖ Remove button allows you to remove a facility from your organization.
        i. Once you select this button, you will be prompted with a warning modal asking you to confirm your choice.
            1. If you select ✔ Yes, this will remove the facility from your organization
            2. If you select ✖ No, no further action will be taken.
3. Locate + Create in the top right corner of the page. This will open a modal with several fields of information.
    a. If you are adding your organization's Home Location, select that checkbox.
    b. The 'Is Active?' checkbox is checked by default; however, if you are adding a facility that is no longer actively used, you are able to deselect that button.
    c. Add the facility name or a contextualizing comment for the facility in the 'Name / Comment' field.
    d. Type the address into the 'Address 1' text box. If you need to add additional information, you can utilize the 'Address 2' text input line as well.
    e. Add the facility's city in the 'City' text input line.
    f. The 'State' entry will default to the State location of your organization but can be changed if necessary.
    g. Enter the zip code in the 'Zip Code' text input line.

h. You can choose an optional County identifier, selections of which will prepopulate from your choice in state.

4. Select Create at the bottom right of the modal to close the modal and add the facility to your organization's list of facilities.

Manage Individual Facilities

Once a facility has been created, you can select to navigate to the Facility Details page.

1. The General Information panel displays the location information of the facility.
   a. If you need to change any location information, select Edit to be taken to an 'Edit Facility' page allowing you to update the information as necessary.
2. The Contact Information panel will display the information for the individual designated as the Primary POC for your organization, if one has been designated.
3. The Location panel will display in a Bing map the location of your facility, based on the address.

Manage Organization Training Courses

Organizations are able to manage their training catalog, be it by adding training courses held at the local jurisdictional level or by utilizing those trainings presented by national training organizations, such as FEMA's Emergency Management Institute (EMI), the National Wildfire Coordinating Group (NWCG), the US Fire Administration (USFA), or Texas A&M Engineering Extension Service (TEEX).

Add Organization Training Courses to Catalog

1. Locate the 'Training Courses' grid and select ^ to expand the grid and view any training courses that have previously been added to your organization's catalog.
   a. Trainings contained in this grid are those developed and presented by your organization.
2. To add a new training course, select Manage. This will navigate you to the 'Manage Training Courses' page.
   a. On this page, you're able to edit exist training courses by selecting Edit to the left of the appropriate course. This will open a modal allowing you to update basic information about the course, including its Name, Code, Description, and Years Until Expiration.
      i. If there is no attached data to a course, you are able to remove it from your Catalog by selecting Delete in the bottom left of the modal.
         1. If the Training Course has been awarded to at least one individual, you will be unable to delete it from your organization's catalog.
         2. If at least one Training Delivery has been scheduled for the course, you are unable to delete it from your organization's catalog.
3. Locate and select + Create in the top right corner of the page. This will open a modal with several fields of input.
   a. 'Is Active?' is selected by default; however, if you're creating a record of courses previously offered, you can deselect this if appropriate.

b. Add the Course Name and the Course Code. These are the only two required fields in this modal.
   i. Each Training Code must be unique within your organization.
c. If you'd like to add a Description, you can type it into the text input field labelled 'Training Course Description'
d. If there is an applicable expiration period, enter it into the 'Years Until Expiration' field. This will field display in the number of years the time the course remains certified for an individual who has it awarded to them.
e. Once all information has been updated, select 

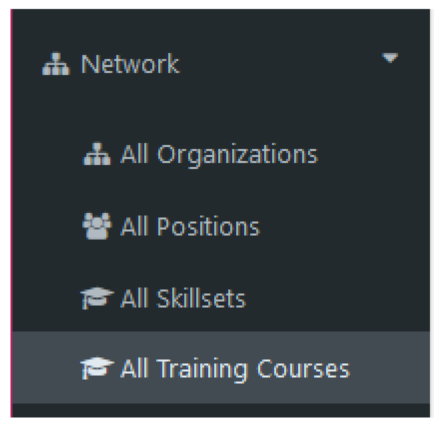
in the bottom right of the modal to close the modal and add the course to your organization's catalog.

4. Once a course has been added to your organization's catalog, it can be added as a Position requirement, awarded to someone as having been completed, or scheduled as an upcoming training delivery.

View Nationally Available Courses

If your organization does not have any organization-specific training, and instead utilizes those trainings offered by national training organizations, such as FEMA's EMI, TEEX, or NWCG, you do not need to add them to your organization's catalog – you already have access to them by being an administrative user of OneResponder.

1. In the dark gray menu on the left-hand side of the page, locate the "Network" option and select it to expand the option and view specific pages. From those sub-options, select "All Training Courses." This will navigate you to a page listing all training courses to which you have access.



   a. This includes all national training provider courses, as well as those offered by your parent organization and any subordinate organization(s) or partnership(s) you may have with other organizations.

2. Locate 'Filters' and select ^ to expand the filters. You're able to narrow the results to display specific training catalogs.
    a. If you would like to see only those training catalogs belonging to your parent organizations, your subordinate organization(s), or your partner(s), select the corresponding checkboxes.
    b. If you would like to view all training courses from a national training provider, activate the dropdown labelled 'Organization' to view the catalogs of all those national training providers in OneResponder.
3. Any of the courses displayed in this list are available to be added as a Position requirement, awarded to someone as having been completed, or scheduled as an upcoming training delivery.
    a. Please Note: While OneResponder remains in its Beta Evaluation period, we will be periodically reviewing the catalogs for the training providers to maintain as up to date a catalog as possible.
        i. If, while using OneResponder, you notice that we have missed a course, please reach out to us at support@oneresponder.net with the information that needs to be added.

View Scheduled Curriculum Deliveries

1. Locate the 'Curriculum Delivery' grid and select ^ to open the grid and view all training deliveries scheduled for your organization.
2. If you would like to view a curriculum delivery in more detail, select to be navigated to the Curriculum Delivery Details page.

More information about curriculum deliveries will be provided in our upcoming User Guide: Curriculum Delivery Management.

Manage Position Catalog

As you begin to utilize OneResponder, you can also establish your Position Catalog, in which you are able to view the requirements for Positions published by national resource organizations, configure those Positions to include your jurisdictional requirements, and create Local Positions for which you determine all of the requirements. Each of these functionalities are demonstrated in the sections below.

View Published Positions

If your organization does not have any organization-specific positions, and instead utilizes those positions as published by national resource organizations, such as FEMA's EMI, AHIMTA, or NWCG, you do not need to add them to your organization's catalog – you already have access to them by being an administrative user of OneResponder.

1. In the dark gray menu on the left-hand side of the page, locate the "Network" option and select it to expand the option and view specific pages. From those sub-options, select "All Positions." This will navigate you to a page listing all published positions to which you have access.

   a. This includes all national resource provider courses, as well as those offered by your parent organization and any subordinate organization(s) or partnership(s) you may have with other organizations.
2. Locate 'Filters' and select ^ to expand the filters. You're able to narrow the results to display specific position catalogs.
   a. If you would like to see only those position catalogs belonging to your parent organizations, your subordinate organization(s), or your partner(s), select the corresponding checkboxes.
   b. If you would like to view all positions published by a national resource provider, activate the dropdown labelled 'Organization' to view the catalogs of all those national resource providers in OneResponder.
3. To view the specific requirements comprising an individual position, select in the left-most column. This will navigate you the Position Group Details page.
   a. All published positions listed in OneResponder are sorted by Position Groups.
4. Locate the 'Positions' and select ^ to expand the grid and view all published positions within the group.
5. Select to the left of a selected position to be taken to its Position Details page, upon which you're able to view the specific requirements that comprise the position.
   a. If necessary, you are also able to download an Excel copy of the position by selecting Qual Sheet in the top right corner of the page.

View Positions in Your Catalog

You are always able to view positions that have previously been created in your organization's Position Catalog, be they configured from published positions or created locally for just your organization.

1. On your Organization Profile, locate the grid titled 'Position Catalog' and select ^ to expand the grid. Within this grid, you are able to see all positions previously added to your organization's catalog.
    a. If you see a Position listed in this grid, you're able to select to view the corresponding Position Details.
        i. The Position Details page for any position in your organization's catalog will display Manage buttons on the far-right of the 'Tasks,' 'Training,' and 'Skillsets' grids, allowing administrators to update the requirements to include any jurisdictional requirements.
            1. You are unable to remove any requirements as determined by the publishing organization. This helps to establish a nationally recognized baseline of requirements, which in turn can help to fortify incident management and response in emergencies that require interjurisdictional efforts.
    b. If there is a position that has not been added to your organization's position catalog, but needs to be added, you can utilize the two following processes to do so.

Configure a Published Position

1. Locate and select Manage on the far-right of the 'Position Catalog' grid. This will navigate you to the Manage Position Catalog page.
2. Locate and select Configure Published Position in the top right corner of the page. This will open a modal containing a list of all positions that have been published by national resource provider organizations in the system.

   a. Any position that is highlighted yellow has already been added to your organization's position catalog.
   b. You are able to utilize the Filters to narrow your search for a specific position and can also utilize the quick search to look for specific positions as well.
3. Click ✔ Select to the left of the appropriate position.
4. Select ✔ Submit at the bottom right of the modal to add this position to your organization's position catalog.
   a. Once added to your organization's position catalog, you're able to select to the left of the position. This will navigate you to its Position Details page, from which you're able to update the position with any jurisdictional requirements as necessary.
   b. More information about updating positions to include jurisdictional requirements will be included in our upcoming User Guide: Resource Catalog Management.

Configure a Local Position

1. Locate and select Manage on the far-right of the 'Position Catalog' grid. This will navigate you to the Manage Position Catalog page.
2. Locate and select Configure Local Position in the top right corner of the page. This will open a modal containing three fields of input.
   a. The 'Category' field contains a dropdown of all position categories in the system. Select the appropriate position category.
   b. The 'Position' field contains a dropdown with a singular option, based on your selection in the 'Category' field.
      i. This selection is displayed as such to further identify the position as a Local Position, differentiating it from a configured published position.
   c. The 'Local Name' field is a text input field in which you can type the name of your Position.

3. Once all fields have been filled out, select ✔ Create at the bottom right of the modal. This will create the position and add it to your catalog.

4. Select to the left of the newly created position to be taken to its Position Details page, from which you're able to update the position with all jurisdictional requirements that comprise the position.
    a. Configured local positions differ from configured published positions in that they have no pre-determined requirements. Their requirements are determined entirely by the jurisdiction that created them.
        i. Note: Local Positions are constrained to the specific jurisdiction that created them. In order to issue this position as a task book to an individual, they must be either a Direct or Auxiliary member of the organization that created the position.
    b. More information about adding jurisdictional requirements to Local Positions will be included in our upcoming User Guide: Resource Catalog Management.

Manage Admin Role Assignments

1. Locate the 'Admin Role Assignments' grid and select ^ to expand it and view all personnel who currently hold administrative roles in your organization.
2. Select Manage to be taken to the Manage Admin Role Assignments page. On this page, you are able to add new personnel to your administrative staff, alter the roles assigned to current administrators, and remove an individual from your administrative staff.

Add New Individual to Administrative Staff

1. Locate and select + Add Admin button in the top right corner. This will open a modal containing a list of all personnel in your organization.
   a. The list will default to show only your direct personnel; however, you are able to open the filters and expand the list to include auxiliary personnel, as well as personnel in your parent organization, and any subordinate organization(s) and partnership(s) your organization may have.
2. Locate the appropriate individual and select + Add to the left of their name.
   a. You are able to select multiple personnel during the same session. If necessary, select + Add to the left of as many names as are appropriate.
   b. If an individual is listed but does not have an + Add button to the left of their name, this indicates that they are already listed as one of your administrative personnel and cannot be re-added to the list.
3. Once all appropriate individuals have been selected, click ✔ Add Selected at the bottom right of the modal. This will close the modal and display the selected individuals in a grid titled 'New Admins'.

4. In the right column of the grid, locate the 'Roles' dropdown. Selecting this dropdown will activate a list of all administrative roles available for assignment.
    a. For assistance determining which role is appropriate, selecting Help will open a modal listing all admin roles, as well as the actions they can perform.
        i. This information is also visible in our Job Aid: Manager Roles.
5. Select the appropriate administrative role(s) from the dropdown.
    a. Individuals are able to hold multiple administrative roles within one organization, if appropriate.
    b. If you have selected multiple personnel to add to your organization's administrative staff, repeat step 5 as many times as necessary.
6. Once all changes have been made, select Save in the top right corner of the page to confirm your updates.
    a. The next time the individuals added log in to the OneResponder system, they will be able to access the Organization Manager portal to perform the actions permitted by their newly assigned role(s).

Update Assigned Admin Roles

1. Locate the appropriate individual listed in the 'Existing Admins' grid.
2. To assign a new admin role to an individual, follow the steps listed below:
    a. Locate the 'Roles' dropdown in the right column of the grid. Selecting this dropdown will activate a list of all administrative roles available for assignment.
    b. Select as many roles as are appropriate.
3. To remove an existing role from an individual, follow the steps listed below:
    a. Each administrative role assigned to an individual is displayed as a badge with an × in its left margins.

Select the × to remove the role from the selected individual.

i. If you remove an administrative role from an individual who only had a singular role assigned, this will activate the dropdown in order to allow you to select another role.

1. You will be unable to save your changes until at least one admin role is assigned to each individual listed in the grid.

4. Once all changes have been made, be they additions or removals of administrative roles, locate and select Save in the top right corner of the page to confirm your pages.

a. If you attempt to leave the page prior to saving your changes, you will be prompted with a warning modal that your changes will be lost if you leave the page.

i. If you select ✔ Yes, no changes will be saved, and you will be navigated to the selected page.

ii. If you select ✖ No, you will remain on the Manage Admin Role Assignments page.

b. After you have saved all changes, the selected individuals will then have their access to the Organization Manager portal updated as appropriate, based on the changes made to their admin roles.

Remove an Individual from Administrative Staff

1. Locate the appropriate individual listed in the 'Existing Admins' grid.

2. Locate and select ✖ Remove to the left of their name.

a. Once you click the button, it will turn into an Undo button, allowing you to preserve the individual's administrative roles.

3. Once all changes have been made, locate and select Save in the top right corner of the page to confirm your pages.

a. If you attempt to leave the page prior to saving your changes, you will be prompted with a warning modal that your change will be lost if you leave the page.

    i. If you select ✔ Yes, no changes will be saved, and you will be navigated to the selected page.

    ii. If you select ✖ No, you will remain on the Manage Admin Role Assignments page.

b. After you have saved all changes, the selected individuals will have their access to the Organization Manager revoked.

    i. NOTE: Individuals who have their administrative roles removed will retain access to their Responder Portal. Removing admin roles does not remove an individual's account.

Review Admin Settings

1. Locate the 'Admin Settings' menu bar and select ^ to expand the grid and view those features enabled for your organization.
2. Select ⚙ Manage on the far-right of the menu bar to be navigated to the 'Manage Admin Settings' page.
3. On this page, you can view not only those features enabled for your organization but also your organization's function type.

View Organization Features

a. You are unable to change any features for your organization.

b. If you are viewing this grid for one of your subordinate organizations, you will be able to enable or disable any features as appropriate.

    i. Note: If your organization does not have a feature enabled, you are unable to enable it for any of your subordinates.

Change Organization Function Type

1. If you would like to change your organization's function type, select the dropdown to open a list of all organization function types that exist in the system.
2. Select the appropriate function.
3. Select Save in the top right corner of the page.

Export Organization Data

OneResponder supports the ability for organizations to maintain ownership of all their data. As a result, every page in the Organization Manager upon which an individual can input data has a corresponding Export button, allowing them to export a copy of all data on the page at any time.

The Export button on the Organization Profile is similar in function, however, has an expanded ability to export data. Users are able to pull a copy of their full organization data offline if they wish.

1. On the Organization Profile page, locate Export in the top right corner of the page. This will open a modal with two columns of selectable checkboxes.
   a. The left-hand column reflects all those grids on the Organization Profile page, and are default selected for export.
   b. The right-hand column reflects all those elements of information contained within your organization's account in OneResponder and are default unselected for export.

2. Select, or deselect, as many fields as necessary using ✔.
3. Once all desired fields have been selected for export, select ✔ Submit at the bottom right of the modal. This will initiate the export.
    a. NOTE: Depending on the number of fields selected for inclusion in the export and the amount of data that exists in your organization, this export may take several minutes to perform. Do not navigate away from the page until the export is complete.